FPA
FOREST PRACTICES AUTHORITY

Notifications System

User Manual – Forest Practices Officers

September 2011

Please note: This manual is still a 'work in progress. If you find inconsistencies, mistakes or simply need a matter clarified, please let the FPA know by e-mailing info@fpa.tas.gov.au

Definitions

The following terms are used within the Footprints system and this document:-

Administrator – the FPA staff member or contractor who is the Notifications System administrator - currently Daniel Livingston or Bernard Walker

Agent – An FPA staff member. For example a Specialist or Admin staff person.

Assignee – the FPA staff members assigned to deal with a notification

Customer – Anyone external (e.g. FPOs) submitting a notification. These users are setup in the Notification system by an Administrator. Customers are also called "**Notifiers**" in this documentation

Footprints – this refers to Numarra Footprints, which is the software on which the notifications system is based.

Notification – The notification cover sheet along with associated electronic documents such as evaluation sheets, maps etc.

Team – a group of FPA specialists who work in the same discipline eg. Biodiversity team, earth sciences team, etc

Background

The Notifications System encompasses the following elements:-

- The receipt of notifications from authorised Customers. This includes the receipt of data and documents that will allow evaluation and reporting.
- A full, date & time stamped record of the communication between a Customer and an Agent leading to the resolution of the notification. The system replaces current email and paper mail correspondence.
- A "container" to safely store the electronic documents produced for a notification. For example, evaluation sheets and maps. All authorised FPA staff can access all notifications.
- A database that can be used to report statistics such as number of notifications completed per time period.
- Data that can be linked to a GIS or other database orientated systems.

Using the System

The system can be accessed from anywhere you have an internet connection. It should work in any modern web browser but only Windows Explorer and Firefox have been tested.

Publicly accessible secure web site (*authorised users only*): https://notifications.dier.tas.gov.au

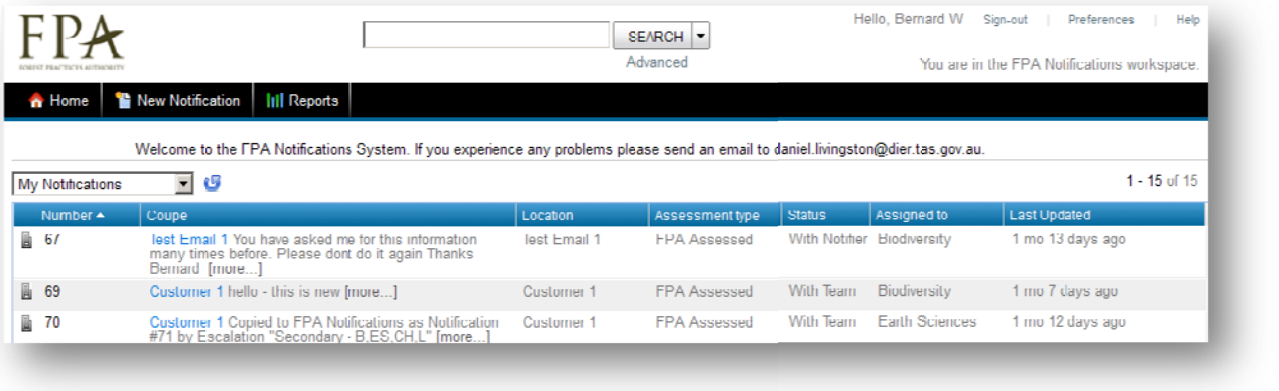
The system email address is: notifications@fpa.tas.gov.au

When you go to the web address above you will see a standard login screen. If you are an existing Coverpage user, we will supply you with a User ID and initial password by e-mail .

If not, your User ID and password can be supplied by the system Administrator, after lodging a request form (can be downloaded from the Services section of the FPA's website).

Configuring the System

After logging in you see the following screen.



Preferences (Menu top right)

You have the ability to change:

- Your password
- Various other user settings

You need to save any changed preferences using your password.

Search (Top middle)

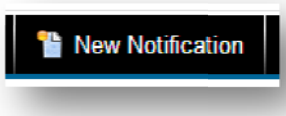
You can choose to search by "Coupe" or by "Keyword" using the down arrow. "Keyword" finds a text string within any of the notification fields. If you need to search on the contents of more than one field at a time, choose "Advanced"

Help (Menu top right)

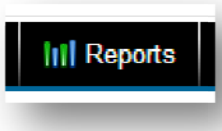
Standard Footprints help is available. This may be useful if you want to understand the broader concepts associated with the operation of Footprints, but may not help you with the FPA's customisation of the software.

Main (Black) Menu Bar

Takes you to your notifications grid.



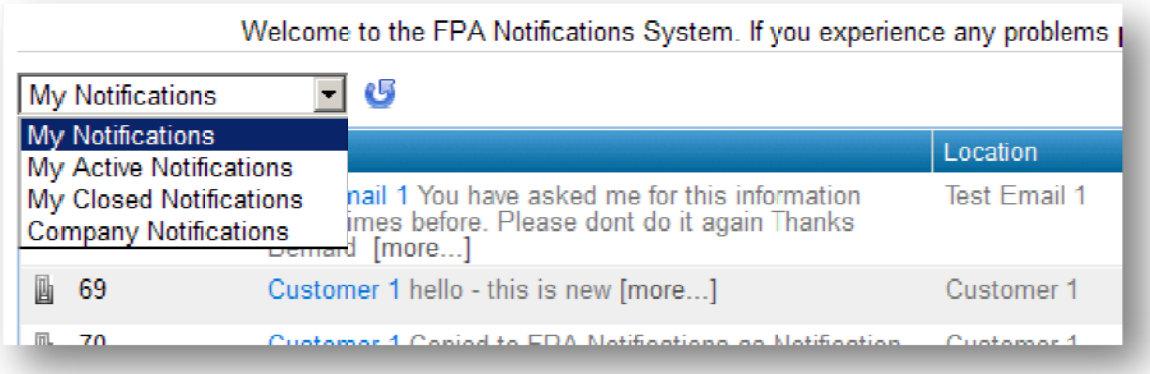
Press this to enter a new notification.



This gives you the option of writing your own reports from the database. Reports include an ability to select subsets of data based on queries as well as specifying a report's output format. E.g. export data to a CSV file. You can report on your own or your Company's records.

Working from the Home Screen

The home screen gives you access to important system functionality:-


Welcome to the FPA Notifications System. If you experience any problems
My Notifications
My Notifications
My Active Notifications
My Closed Notifications
Company Notifications
Location
nail 1 You have asked me for this information
imes before. Please dont do it again Thanks
[more...]
Test Email 1
69
Customer 1 hello - this is new [more...]
Customer 1

1. An ability to display all or a subset of the FPA's notifications based on pre-defined filters.
2. Access to the Notification "grid" that allows you to sort notifications by any of the fields displayed in the grid.

Note: Upon request any system user can be assigned a Company code. Notifiers have access to another Notifier's records if they share a common "Company" code. It is not possible for a Notifier to be a member of more than one "Company". However, notification information can readily shared with anybody by email at the time of notification creation or editing.

Notification Creation, Edit & Closure Workflow

Customer submits a notification via the Web

If the notification is directed to more than one Team the system copies it and allocates a copy (including attachments) to each relevant Team (Eg Biodiversity, Landscape).

Note that if the notification is directed to more than one Team, the Customer will be requested to add any attachments not common to all Teams AFTER the initial notification has been submitted. This workflow will ensure that each notification record only stores the attachments relevant to the Team.

The system sets the notification's "Assigned To" field automatically to the appropriate Team name and its "Status" is set to "With Team".

If the notification was copied to different Teams, the Customer edits each record to add the appropriate attachments.

A member of the Team "edits" the notification and manually makes (at least) the following updates:-

1) Changes the "Status" to "With Specialist" or alternatively "With Notifier" if the notification is to be sent back to the Customer for more information.

2) Updates the "Evaluation type" field.

3) Assigns a member of the Team to work on the notification.

4) Updates the "Comments" Field.

5) Saves the record which causes an email to be sent to the customer AND the Agent detailing these changes.

The Team member and the customer communicate via the web interface or the system email address until a satisfactory outcome is reached

It is critical that the notification's "Status" field is updated by the Team member throughout this process

The Team member "closes" the notification using the "Actions" dropdown on the Home Screen.

If the Customer does not consider it is finalised, they can request that it be re-opened.

Notification Creation

Creation occurs via the web interface.

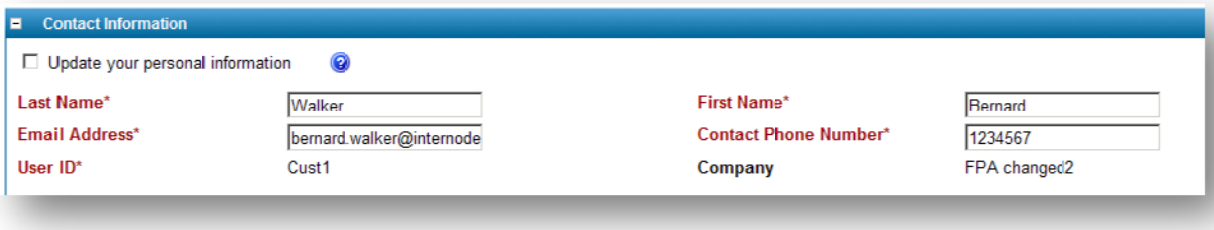
When a notification is submitted, an email is sent to the submitter. This email contains submitted attachments and a formatted report of the completed fields in a form that is suitable for printing or storing in a document management system such as TRIM. If the Customer submits a notification to more than one Team they will get a reply email for EACH copied (Team) notification (including all attachments).

The system also sends an email to the FPA Assignee with the same information described above.

The fields are very similar to those currently used on the paper notification facing sheet. Some of these have been adjusted to be the same as the Cover Page database application.

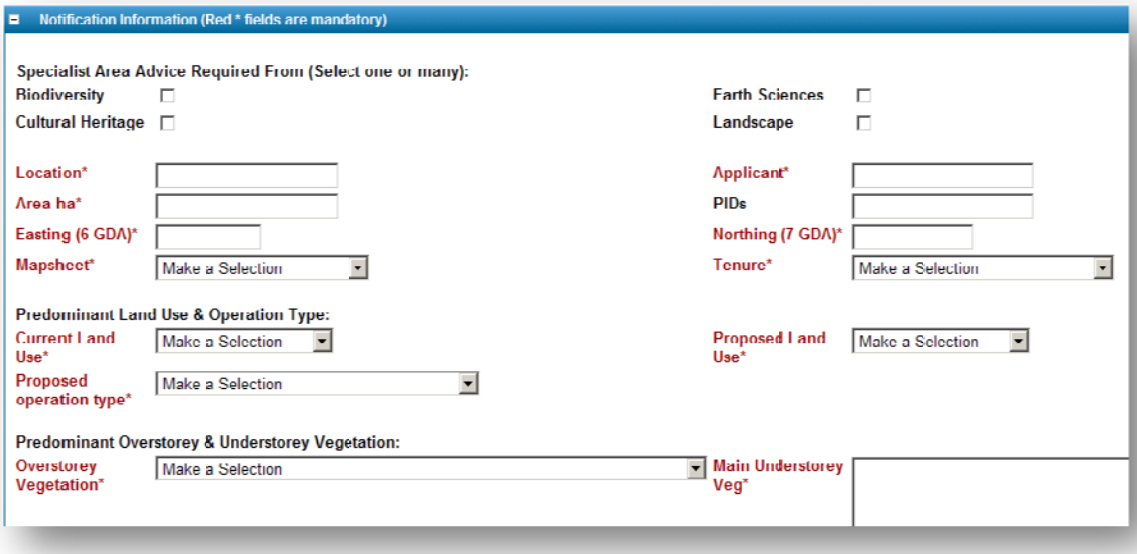
Fields are ordered in "Tabs" that can be expanded or collapsed using a "+" or "-" button to the left of the tab descriptor.

Contact Information



The Contact Information fields gives you the option of updating your name, email address and phone number. You need to click the check box for this to be saved for future use. **Note**: These details are ONLY changed in this application. Any changes to these details should always be advised to the FPA so that other systems can be updated also.

Notification Information



The Notification information fields are similar to those used on the existing paper facing sheet. Some have been changed to single select, dropdown lists. In this case just select the option that applies to the **predominant** part of the coupe. If this doesn't adequately explain the situation state this in the Comments field further down.

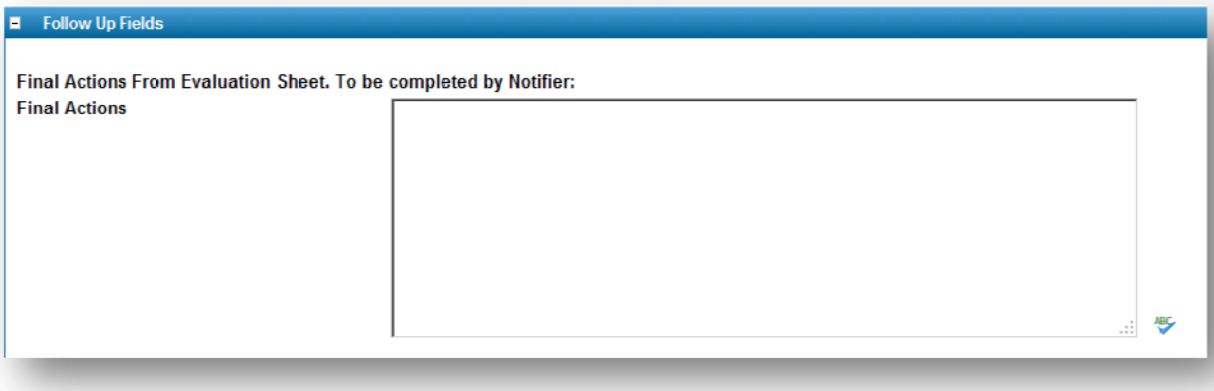
Red fields are mandatory.

An Applicant field has been added. This has the same definition as is used for the Cover Page system. This field is useful to the FPA when the notification is being prepared by a Contractor on behalf of a third party.

If you select more than one specialist area your notification will automatically be copied to create one notification per specialist area.

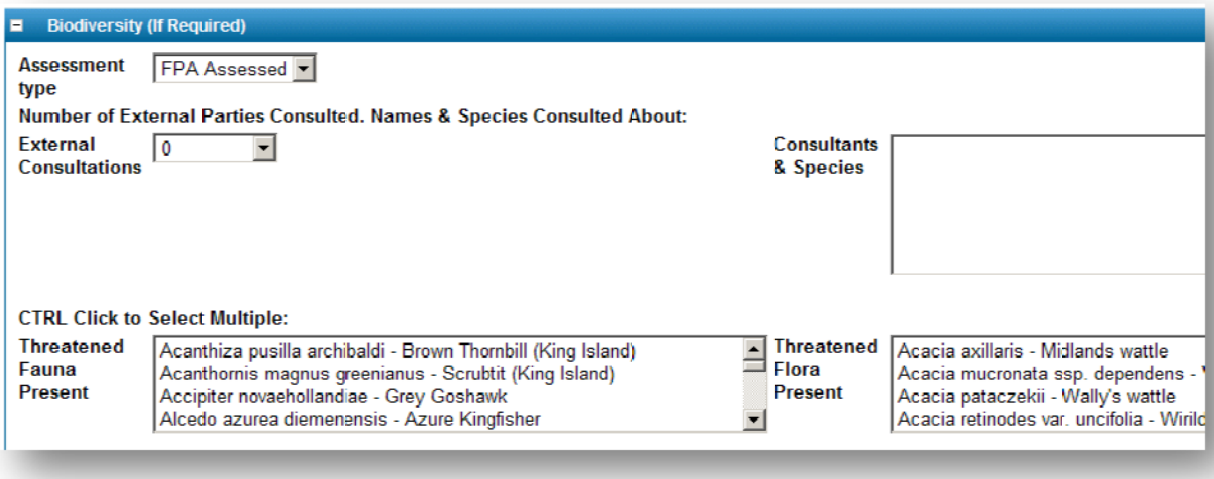
Note: If you want to add a specialist after the initial notification submission, please contact the system Administrator.

Follow Up Fields



The Final Actions field must be completed at the end of the Notification process and be equivalent to the prescriptions used in the Forest Practices Plan (where relevant).

Biodiversity Fields


Biodiversity (If Required)
Assessment type
FPA Assessed
Number of External Parties Consulted. Names & Species Consulted About:
External Consultations
0
Consultants & Species
CTRL Click to Select Multiple:
Threatened Fauna Present
Acanthiza pusilla archibaldi - Brown Thornbill (King Island)
Acanthornis magnus greenianus - Scrubtit (King Island)
Accipiter novaehollandiae - Grey Goshawk
Alcedo azurea diemenensis - Azure Kingfisher
Threatened Flora Present
Acacia axillaris - Midlands wattle
Acacia mucronata ssp. dependens -
Acacia pataczekii - Wally's wattle
Acacia retinodes var. uncifolia - Wirilc

The Biodiversity fields only need to be completed if advice is requested from the Biodiversity Team.

The Assessment type refers to the type of notification.

FPA Assessed – Standard notification where Biodiversity specialists are being asked for advice

Self Assessed – Notifications that have been completed by authorised Biodiversity "experts". In this case no communication between the FPA and the Notifier is required. The FPA just requires the submission of the Notification fields, Biodiversity fields, relevant attachments and final Actions.

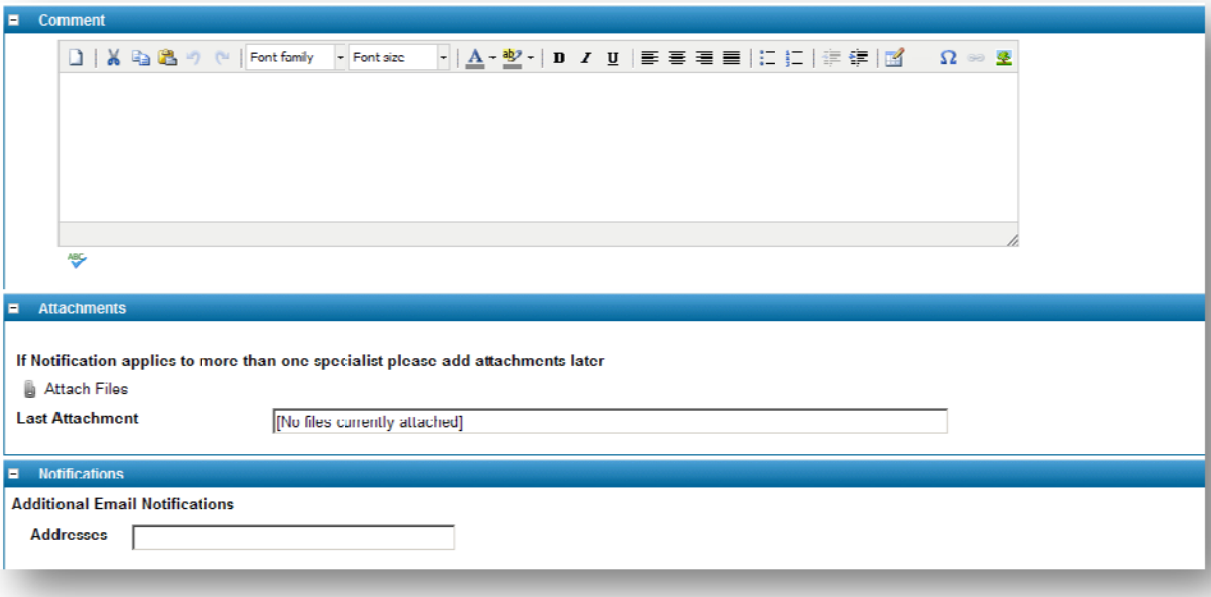
The number of External Consultations dropdown is important for the FPA to allow it to meet its external reporting obligations. If for example, 2 External Consultations are selected, please then list 2 Consultants and Species in the supplied text field.

The Threatened Fauna and Flora are "picklists" where you can continue to select extra species by holding down the "CTRL" key. It can be difficult to see what entries have been selected when in "edit" mode but they are listed and readily seen when viewing in "details" mode.

Landscape Fields

If the coupe consists of both native forest and plantation you could choose to complete both sets of fields. Otherwise just select the predominant type.

Comments, Attachments & CC emails



The Comments field is very important in the Notification System as it is the field where two way communication occurs between FPA staff and the Notifier. It can be edited via the website or via email by writing responses at the top of the e-mail you are responding to ("reply above the line").

Attachments include Evaluation Sheets, photos, maps etc and other critical documents can be added anytime. There are limitations on file types and sizes that can be attached. Please see Appendix 1 – Guidelines for Attachment of Documents and Photos in the Footprint System.

Three attachments can be attached at a time totally 10MB. You can continually add "batches" if more than three attachments are required. At this time, only FPA staff can delete attachments so if you want something deleted, please request this in the notification comments field.

The Additional Email Notifications field allows you to specify email addresses (separated by semicolons) to which all notification information (including attachments) will be sent.

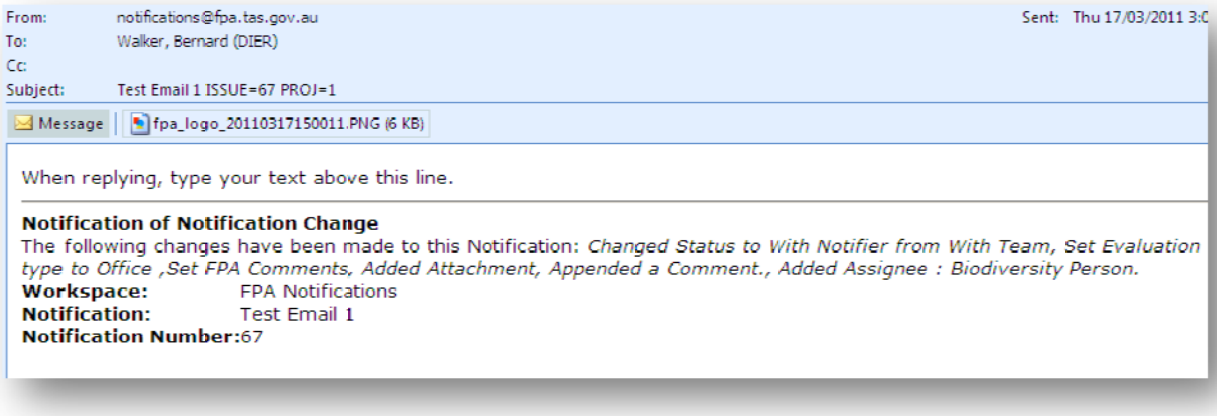
Viewing & Editing Notifications

Once created, notifications can be updated using one of two workflows: by “Email” or “Web”.

Both workflows only allow the change of the Comments or Final Actions fields or the management of attachments. If any other fields need to be changed after initial submission you need to request this via the Comments field.

An automatic system email is sent to both the customer and the Assignee (Should by now be an individual Team member) any time any field in the notification is changed.

Updating by Email


From: notifications@fpa.tas.gov.au
Sent: Thu 17/03/2011 3:0
To: Walker, Bernard (DIER)
Cc:
Subject: Test Email 1 ISSUE=67 PROJ=1
Message
fpa_logo_20110317150011.PNG (6 KB)
When replying, type your text above this line.
Notification of Notification Change
The following changes have been made to this Notification: Changed Status to With Notifier from With Team, Set Evaluation type to Office ,Set FPA Comments, Added Attachment, Appended a Comment., Added Assignee : Biodiversity Person.
Workspace: FPA Notifications
Notification: Test Email 1
Notification Number:67

The email can be sent from any mail client (eg Outlook) but MUST always be sent to notifications@fpa.tas.gov.au and MUST have a subject line that relates to the notification concerned ie. **the subject line must not be changed in ‘reply to’ e-mails**

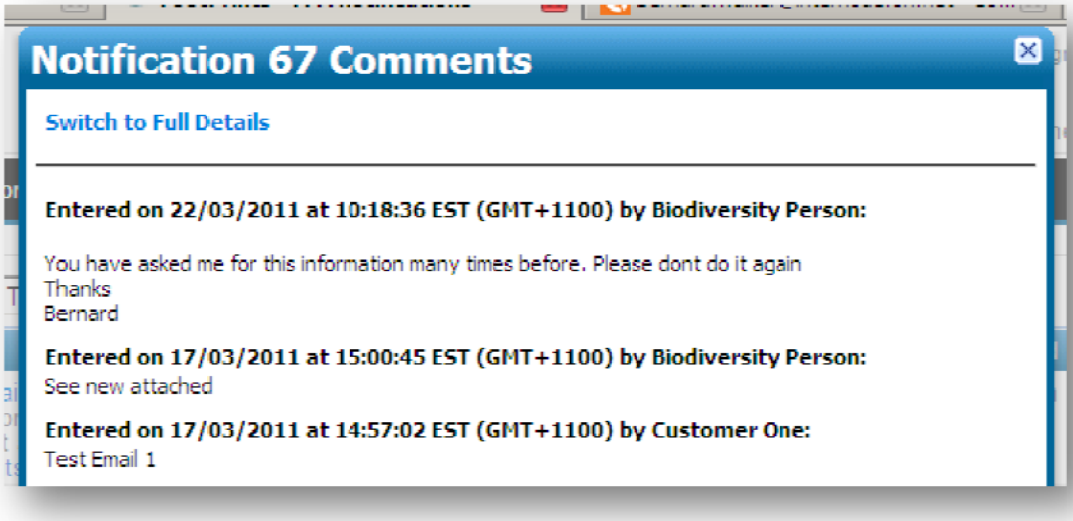
The text “above the line” is appended to the existing notification as a new comment and any attachments are added as new attachments to the web based notification. See above screenshot for an example. **When replying to an email, please delete email signatures etc that get automatically added “above the line” by the email client.**

Updating by Web

Access to notifications whilst working in the web environment is via the Home Screen "Grid"

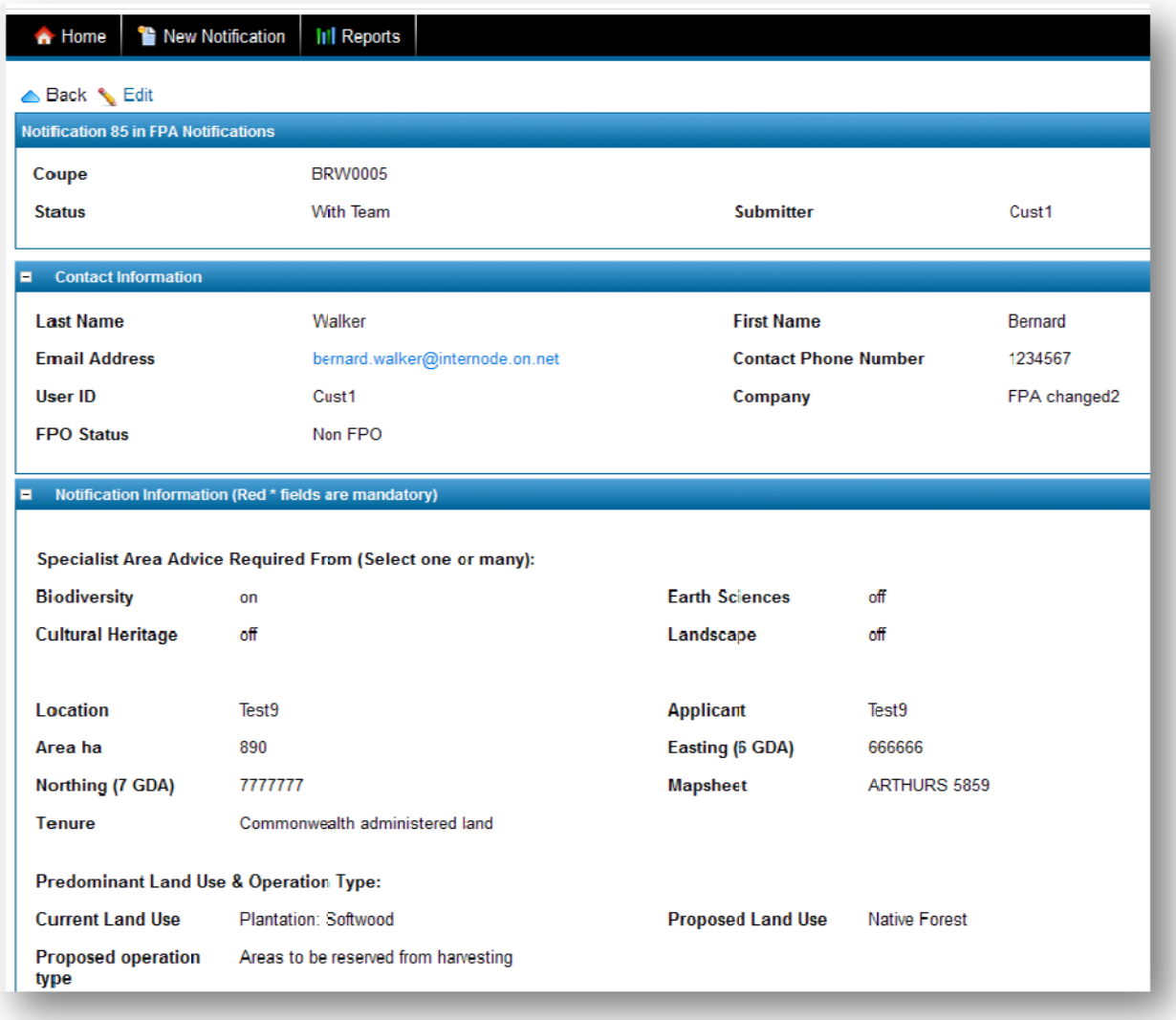
From the web interface you press the […more] link in the coupe field and you are presented with three options:-

Comments


Notification 67 Comments
Switch to Full Details
Entered on 22/03/2011 at 10:18:36 EST (GMT+1100) by Biodiversity Person:
You have asked me for this information many times before. Please dont do it again
Thanks
Bernard
Entered on 17/03/2011 at 15:00:45 EST (GMT+1100) by Biodiversity Person:
See new attached
Entered on 17/03/2011 at 14:57:02 EST (GMT+1100) by Customer One:
Test Email 1

This shows you a non editable, time stamped view of the correspondence that has occurred via the Comments field.

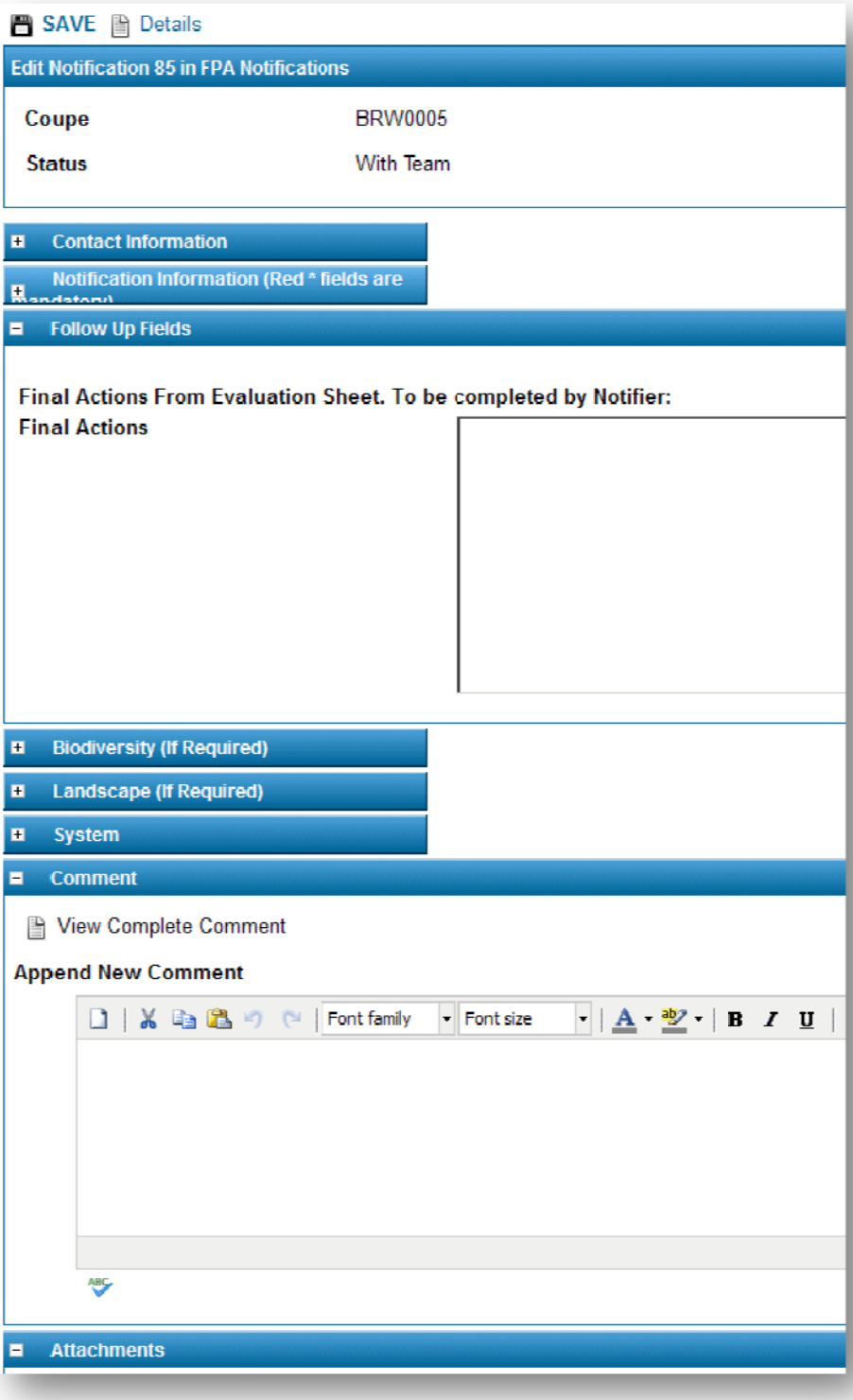
Details



This shows you a non editable view of all fields in the notification. Note that the History tab at the bottom of the screen provides a full record of changes that have occurred since the notification was submitted.

Edit – Takes you into edit (update) mode where Comments, Final Actions and Attachments can be updated.

Edit



This menu item provides edit access to the Comments, Final Actions and Attachments fields. Upon pressing **SAVE** an email advising of an update will be sent to the FPA. The Final Actions field should be completed at the end of the Notification process and be equivalent to the prescriptions used in the Forest Practices Plan (Where relevant).

Closing Notifications

Closure of a notification will be initiated by the FPA specialist once they consider that the notification is finalised. This would generally mark the point where:

1. All required advice has been supplied.
2. The Notifier has completed the Final Actions field
3. OR – the Notifier has advised that the coupe will not proceed to the FPP stage.

All communication on these points is via the Comments field. Once these conditions are met, the FPA specialist will close the notification. It can be reopened at any stage at the request of the Notifier.

Queries

If you have any queries about the system please direct them to Daniel Livingston at info@fpa.tas.gov.au or phone (03) 6233 7966

Appendix 1 – Guidelines for Attachment of Documents and Photos in the Footprint System

The Notifications system can be used as a "container" for electronic documents including PDFs, Word and Excel documents, photos etc. However there are limits to the size of attachments that can be uploaded. The limits impact on two aspects of the system.

1) **Upload via web browser**. No individual attachment, or batch of attachments, can be greater than 10 MB in size. However any one notification can have a greater total size of attachments than this.
2) **Email**. Each time a notification record is created or updated, a copy of the record, including relevant attachments, is emailed to the notifier and the FPA. As such, the capacity of the Notifier and FPA's email server to cope with large attachments becomes relevant. If the attachments are too large the email will simply be rejected by the sending or receiving mail server.

Reducing Document Sizes

To cater for likely lowest common denominator for system and email server limits, **keeping the total size of attachments to less than 4MB is desirable.**

Generally the best was to minimise the size of documents is to ensure that any images included in them are reduced to a sensible resolution and image quality.

Images include photos, scans from a scanner and "print screens" from a computer. Prior to inserting images in documents or sending them as independent attachments, they should be reduced to the minimum size possible as per the following guidelines:-

Image type – Jpg format only

Image Resolution – No greater than 150 DPI (Dots Per Inch)

Maximum size – Horizontal measurement no longer than 1024 pixels. Vertical size no greater than 768 pixels

Image Quality – Use say 8.5 out of 10 or 85% or "Good" depending on your image or PDF creation software

Other documents such as the completed Evaluation Sheets can be sent as native Word documents or converted to PDFs using the image compression guidelines listed above.

Document Control Log Table

Document summary information

Document name	**Notifications System User Manual – FPOs**
Version	3.0
Trim record	2011/75839
Owner	Daniel Livingston
Author(s)	Bernard Walker & Angus MacNeil
Release date	22 Sep 2011
Release Approved by	Angus MacNeil
Release status	Approved for release 22 Sep 2011

Version control

Version	Date	Author(s)	Summary of changes
2.0	12 Aug 2011	Bernard Walker	Document finalisation at end of testing phase
3.0	22 Sep 2011	Angus MacNeil & Daniel Livingston	Added FPA logo, document control log, made many textual amendments and minor formatting changes

Stages required for release outside FPA

Category of advice (A1, A2, B1, B2, B3 or C):		**C**
Stages	**Required/not required**	**Completed (date)**
Specialist	**Required**	**22 Sep 2011**
Line Manager	**Required**	**22 Sep 2011**
Peer/FPO/stakeholder review (**FPA staff**)	**Required**	**12 Aug 2011**
CFPO	**Not Required**	
FPAC	**Not required**	
Board	**Not required**	